



# COUNTY OF LOS ANGELES

## CHIEF INFORMATION OFFICE

500 WEST TEMPLE STREET  
493 HALL OF ADMINISTRATION  
LOS ANGELES, CALIFORNIA 90012

JON W. FULLINWIDER  
CHIEF INFORMATION OFFICER

TELEPHONE: (213) 974-2008  
FACSIMILE: (213) 633-4733

April 16, 2004

To: Supervisor Don Knabe, Chair  
Supervisor Gloria Molina  
Superior Yvonne Brathwaite Burke  
Supervisor Zev Yaroslavsky  
Supervisor Michael D. Antonovich

From: Jon W. Fullinwider  
Chief Information Officer

Subject: **STATUS ON RECOMMENDATION CONCERNING E-DOCUMENTING PROJECTS**

This memo is in response to your Board's motion of August 6, 2002, instructing the Chief Information Office (CIO), together with the Director of Personnel and the Registrar-Recorder/County Clerk, to review various ongoing e-documenting/electronic document management system (EDMS) projects that might be used as a model(s) demonstrating opportunities for improved efficiency within the County, and to report back to you with recommendations. The following information provides a current status on our efforts to conduct a countywide assessment and develop recommendations that address opportunities for the strategic application of EDMS within the County.

As reported previously, an online survey was developed and distributed to all County departments requesting detailed information concerning EDMS projects. The survey identified departments with EDMS systems, the type of applications currently in production or in the planning stages, as well as those departments without EDMS systems but that may have business activities or needs that could be effectively addressed through deployment of EDMS technologies.

Additionally, this office met with the Chief Administrative Office (CAO) to discuss a related February 18, 2003 Board motion instructing the CAO to report back with an overall plan for maintaining and preserving County records and archives, including cost estimates. As a result of that directive, and a subsequent March 4, 2003 Board instruction to the CAO that included reviewing and revising the distribution methods of all interdepartmental correspondence, the CAO issued a four-part survey to all County departments/agencies requesting, in part, information on Records Storage and Electronic Transmission. At our meeting with the CAO, this office agreed to assume the

lead in coordinating both the August 6, 2002 and the March 4, 2003 motions as relates to addressing distribution methods for interdepartmental correspondence and County information, since there were many issues that were common to both efforts.

As reported in our previous status report, this office has acquired the services of a consultant to assist us in formulating a County strategy, architecture and metrics for the deployment of EDMS, including reviewing the requirements under the Board's March 4, 2003 instruction to the CAO regarding interdepartmental correspondence and County information. The company selected to assist with this effort is Doculabs.

As also previously reported, the project is being conducted in the following four (4) phases, with a final report to your Board expected to be completed within the next 45 days:

- **Phase 1: Current State Assessment (Completed)**

An in-depth data gathering exercise in which the Doculabs analyst team will gain a detailed understanding of the County's specific needs and current technology solutions. This includes understanding the County's business objectives, assessing current processes, and examining the existing infrastructure. This information will serve as the foundation for subsequent phases of the project, ensuring that Doculabs obtains a well-founded understanding of the County's needs in order to more accurately recommend a conceptual approach for meeting its future state and to recommend the most appropriate strategies.

- **Phase 2: Future State Definition and Conceptual Design (Completed)**

Based on Doculabs' assessment of the County's current state, the consultant developed high-level recommendations and a conceptual design for the County's future-state environment at the enterprise level. This high-level conceptual design is intended to help County departments better understand the key components and interdependencies of the EDMS environment.

- **Phase 3: High-Level Deployment Strategy and Tactical Plan (Completed)**

In this phase, Doculabs outlined the sequencing and the interdependencies of various tactical projects and activities that will be required to move forward with the County's enterprise EDMS strategy.

Doculabs created a high-level deployment strategy or "roadmap" that identifies the major initiatives in support of the County's business requirements and ideal future state, identifying key interdependencies, priorities and opportunities. This plan will identify and prioritize those activities that should be conducted within the next three to eighteen months.

- **Phase 4: Validation and Communication (In Progress)**

In this phase, Doculabs is aggregating its analyses into a final report. Once the report is finalized, Doculabs will conduct formal on-site presentations of the final report and its recommendations. Doculabs will present this information to the following groups of individuals:

1. **Department Heads/Directors**
2. **Chief Deputies**
3. **Half-day EDMS Workshop with Department CIOs - I/T Directors.** This will entail a half-day meeting to present the strategy, discuss the technical details, and to answer questions.

### **CURRENT STATUS**

Since our last report, Phases 2 and 3 of the project have also been completed.

As mentioned above, the CIO engaged Doculabs to perform an analysis and to prepare a strategic directions document regarding the current state and future expansion of EDMS technologies throughout the departments and commissions of the County.

As a component of Phase 1, the CIO provided documentation for Doculabs' review, including the results of its countywide survey of EDMS technologies, information concerning the records management initiative, the County of Los Angeles Strategic Plan and the 2003-2004 Business Automation Plan (BAP) for each County department.

Doculabs then conducted a series of on-site interviews with key individuals representing 27 major departments and commissions of County government. The objective of the interviews was to provide Doculabs with an understanding of County processes that would allow them to identify potential opportunities for the deployment of EDMS technologies.

Following information-gathering sessions, Doculabs delivered its findings in a Current State Assessment (as described under Phase 1 above) for review and comment by the CIO and by each of the individual County departments and agencies interviewed. During this reporting period, Doculabs completed the development of a Future State Definition and a Conceptual Design (Phase 2 above) for the deployment of EDMS technologies across the County and has also delivered their work on a High-level Deployment Strategy and Tactical Plan (Phase 3 above) for deploying EDMS technologies in the immediate future.

Doculabs delivered each of these separate work products to this office for review and comment. Doculabs then incorporated all revisions and corrections into the final version of the report, which was delivered on March 30, 2004 and is now being reviewed by this office for final approval. As a final deliverable on this project, Doculabs is developing and finalizing a formal presentation of the report's findings and recommendations for Department Heads and Chief Deputies, as well as an informational half-day workshop

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for Department CIOs and I/T Directors. These presentations will be conducted during the months of April and May 2004.

My office will continue to provide your Board with status reports at 60-day intervals until a final report is issued. If you have questions or require additional information, please contact me at (213) 974-2008, or in my absence, Jonathan Williams at (213) 974-2080.

JWF:JW  
EB:ygd

c: Michael J. Henry, Director, Human Resources  
Conny McCormack, Registrar-Recorder/County Clerk  
Susan Toy Stern, Chief Deputy, Human Resources  
Raoul Freeman, Chair, Information Systems Commission